



Strategic Marketing Plan

FY 2010/11

Approved July 7, 2010

Strategic Marketing Plan

Marketing is defined as the activities of the library associated with planning and delivering materials or service that the public utilizes as well as the activities that maintain that patronage. It includes activities such as, branding, advertising, publicizing, merchandising, and personal communications. The four 'Ps' of marketing are product, placement, price (convenience) and promotion. The ultimate goal of marketing is to match the library's materials and services to the people who need and want them, thereby ensuring viability. Marketing is a means of presenting the benefits of the library to all segments of the community.

The Marketing Plan for the library would include a yearly review to evaluate the previous year and to set goals & objectives for the next year. Each year we do this should become easier. The steps in creating the marketing plan are as follows:

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| 1. Examine the library mission and purpose | Board |
| 2. Examine current marketing situation at the library | Director |
| 3. Assess library capabilities with an internal assessment or marketing audit, including an internal SWOT (strengths-weaknesses-opportunities-threats) analysis and an external PEST (political-environmental-social-technological) analysis. | Focus Groups |
| 4. What products/services community wants & perception of the library | Focus Groups |
| 5. Develop goals/objectives based on research | Board |
| 6. Select strategies to promote products that are achievable (4 P's) | Director/Board |
| 7. Create plan of action that describes all steps: specific tasks, timelines, assignment of responsibilities, and budget | Director |
| 8. Evaluate results/plan for future years | Board |

Executive Summary:

The Charlevoix Public Library (CPL) serves a district population of 9,784 situated near an isthmus that connects Lake Michigan and Lake Charlevoix in Michigan's northwest Lower Peninsula. The summer resort population of Charlevoix swells to close to 25,000 people in the months of July & August. 57% of the residents own a library card. The library is primarily funded through a district wide millage. The library has been housed in the renovated 1927 school since 2006. This building has opened the door to high quality library services for an area that had been underserved for years. With the increase in the operating millage to open the new facility, the library has had the opportunity to hire an extraordinary staff to bring in high quality materials and programs.

The CPL offers products and services that include: adult and youth books, audio recordings of books and music, periodicals, reference, online OPAC, databases and a special collection of local history and genealogy, and a myriad of programming and computer classes. The web site provides the district population access to the state-wide lending library MelCat. The web site also houses the obituary database and local history information on Bob Miles and Earl Young. The web site is also the place to go to read the current newsletter or to sign up for a meeting room.

CPL offers a wide variety of programming from pre-school story hour and crafts, to author visits, workshops, musical performances and computer training. The staff is made up of the director, and four full-time professional department managers. There are 19 people working at the library 13.3 FTE and 4 FTE are professional librarians. The library also boasts close to 2,000 volunteer hours every year, recruited through their strong and active Friends of the Library group.

The library circulates over 116,000 items each year; sees over 167,000 people come through the doors; provides over 40,000 log-ins to their computers; owns close to 50,000 items; and answers more than 3,000 in-depth reference questions every year

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Although we do not look at other organizations as competitors, there are many groups out there that do offer similar services, including book stores, schools, non-profit organizations, the city, and the Internet. We look to these groups for partnerships and collaborations as we all have the same mission – serving the public.

The ultimate goal of this marketing plan is to increase the usage of the library by seeing an above average increase in the circulation and number of registered patrons.

Mission Statement:

The Charlevoix Public Library provides inspiration, information, and education for the community.

(Adopted May 13, 2010)

Vision Statement:

The library welcomes all who enter its doors with quality service, collections and programs. It strives to be a vital community resource and a commons area for its patrons. The library affirms this commitment to the community by stimulating cooperation, sharing resources, and providing access to a world of information.

(From the 2006-2011 Strategic Plan)

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Current Marketing Situation:

There is no marketing plan in effect at this library at this time. There have been some efforts made that may lay groundwork for a marketing plan. The following information was gathered to determine the marketing opportunities that exist for this library. Efforts were made to ensure that the information is accurate, current, and relevant to future marketing strategies:

They are:

1. A comprehensive planning process was conducted in 2005. The process included a demographic analysis of the service area, community input, a patron survey and a SWOT analysis. This process resulted in a 5-year strategic plan that included goals, objectives and actions. All actions from that plan have been completed. Another planning process took place in the winter of 2010 which culminated in the Strategic Plan 2011-2013.
2. Some promotional efforts are ongoing: weekly press releases on services and programs, quarterly print newsletter, weekly electronic newsletter, radio spots, Facebook page, up to date web site, in-house posters and take-away flyers. Opportunity: more radio ads, NPR, Cable TV
3. The strategic planning session was held with Lyn Jenks and overwhelmingly the Marketing Plan was first on the list of priorities.
4. A current SWOT analysis was conducted with staff and board members.
5. Mission Statement and service goals (See above)
6. Focus Groups conducted to review what patrons would like us to do
7. U.S. Census Bureau Quick Facts: includes people, business and geographic information.
8. Library statistical information
9. Meetings with staff and Board to focus programming goals

Environmental Analysis

The following are a list of trends that may influence this library today and in the future. Monitoring the political, economic, social and technological influences of a library should be done on a continuous basis. Trend knowledge will help in better strategic planning and decision-making.

Political Factors

The political arena has a huge influence upon the regulation of businesses and public entities. The Charlevoix Public Library is formed as a district library and is a self-reliant governmental agency. The library is run by a seven member, appointed board of directors. Although board members have three year terms, there is no limit to how many terms they may serve. The board members are appointed by the township and city governments and school board, who are all part of the library district. The board is very stable and we are currently looking at a more intensive board training workshop. Diversity of skills, age and background should be considered as board positions become vacant. The DDA has postponed their pledge supporting the debt millage, until some of their debt is paid off. Currently many of the governmental agencies in the area support the library's efforts and would gladly collaborate on different and unique efforts. The whole community encourages downtown development and activities.

Economic Factors

Currently the library is funded through two voted operating millages. One is in perpetuity and the other is a voted, 20 year millage, due for renewal in 2024. This funding is primarily affected by property values. Currently the property values are on a decline. The library board has done a good job in providing adequate fund balance and operating cash flow as well as set-up a long term maintenance account for the facility. But, interest rates are quite low at this point so that substantial savings is not making much on the dollar. The inflation rate is currently less than 3%. Although the economy in Michigan is still on a decline, it is slower, and it looks like it will

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have a turnaround in the next few years. But, the predictions are a slow Michigan recovery. Lead employers in the area are the hospital, the schools, and tourist type industry.

Socio Cultural Factors

The Charlevoix area is dominated by white (96%), Christians, with a portion of very conservative families. Many of the library users are retired, local Charlevoix residents who have come back north for their later years. These residents have disposable income and many choose to support library activities. Over 97% of the residents speak English so language is not a barrier. Many residents are employed seasonally and there are many summer residents. The population booms in July and August. The roles of men and women seem to be very diverse, although traditional at heart; the women are key players throughout the area. There is some concern that the non-users truly have no idea what services the library has to offer. The demographic breakdown is as follows:

- 23 % of the service population is under the age of 18.
- 17% of the service population is 65 and older. This is expected to grow.
- 40% of the service population is 25 – 44 years old.
- Per capita income in the county is \$29,830 (2008 adjusted \$)
- 24% of the service population have a bachelors degree or higher.
- 12% of the population is veterans.
- This library is one of five libraries throughout the county.
- Charlevoix County is 417 square miles of land and 974 square miles of water. There are 63 persons per square mile. The library is located in the county seat but its geographic area is large and remote.

Overall, community's awareness of the library has grown tremendously since moving into the new facility, but there are still large pockets of potential users.

Technological Factors

Technology is vital for competitive advantage, and is a major driver of globalization. Currently the library provides free broadband access (10/1 MB) to all its residents. The library provides a shared ILS accessible via the web as well as a partnership with the state-wide sharing system, MelCat. The library also provides data-base access and has a Facebook page. The library staff currently provides workshops for patrons to help bring people up to speed. There seems to be a never ending pool of people who need basic training. With ever accelerating changes in technology, keeping hardware and software updated over time is important and costly. There is huge growth in access via technology and the library needs to stay on top of it or they may fall into the obsolete.

*In an effort to get the most current thinking, a **SWOT** Analysis was taken by gathering the input of current staff and board members. One session held at a board retreat on November 19th, 2009 and the other at a staff in-service on December 17th, 2009. Results follow:*

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Strengths:

- Staff: Teamwork; Quality of Management; Experience & Education of staff; Composure; communication;
- Director - leadership
- Building: Not just books (social interaction); History; Layout; Belvedere Room
- Programming – adult and youth
- Innovative services
- Hours
- Friends of the Library – volunteers
- Collection – the variety; historical
- Art Displays
- Dynamic Environment
- Resources available: PAC2; MelCat
- Library Philosophy of everyone leaves with what they came in for
- Library Board
- Collaborations
- Technology plans
- Focus on enhanced computer literacy
- Financial operations
- Reputation in community – people want to be involved with library

Weaknesses:

- Building layout – handicap accessibility (ramp at Mason...)
- Lack of Staff gender and racial diversity
- DVD collection – not large enough
- Staff composure after too many hours on desk
- Lack of computers during peak hours
- Don't draw from all segments of population
- Lack of diversity on Board - not representative of total community
- Relationship with schools
- Not enough staff time for them to be thorough 100%
- Endowment program
- No coffee shop
- Not enough technology assistant help
- Youth programs not reaching targeted populations
- Communication of policies to public
- Expectations of library very high
- No stage or spotlight for programs
- Facility can be intimidating
- Circulation system not user friendly
- Too costly
- Technology always needs improvement

Opportunities:

- Computer Education
- Stronger connection with the schools
- More outreach
- Marketing on local cable
- Bookmobile
- Librarian calendar
- Illiteracy programs and services
- ESL collections and services
- Connection with the tribal community
- Use outside groups for promotion
- Staff visit other libraries and conferences
- More feedback from citizens – i.e.: suggestion box/blog
- Support for workers that are retraining
- Increase support base
- Better service to businesses
- Bad Economy
- Music Programming for teens
- Defining market – contact non-users
- Roof – solar/wind/rain garden uses
- Our visitors and program participants that use the meeting room but not the library

Threats:

- Changing definition of library
- Losing the physical book and the knowledge that they bring
- State funding for services
- Local property values
- Changing technology – need to Stay flexible
- Intimidation of technology for patrons
- Complacency – we're doing great so why change?
- Lack of community support
- Lack of respect for policies and staff
- Unknown service needs
- Computer illiteracy
- Lack of access to high speed internet for entire community
- Keeping Board educated
- Inaccurate Public perceptions
- Population loss
- Roof Leaks

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Marketing Mix:

In focusing on the goals of the marketing plan, a review of the 4 P's is in order. By creating the marketing mix, a better exchange relationship can be created with target markets.

Products:

- Materials: books, audio recordings of books and music, DVDs, newspapers and other periodicals, Michigan History Collection, databases and other research tools
- Remote Access Web Site: gives patrons the opportunity to access the CPL catalog and those of others in the circulation consortium, reference, special collections, community information, youth services, ILL, book clubs, and an overview of the library.
- Programs: Youth reading and literacy programs, special exhibits, reference help and community programs.
- Computer services: provide public access computers, wireless connection, and training.
- Services: meeting room space, reference, forms, used books, recycle drop off.
- Building: people visit just to see the library facility and grounds.

Price:

- Darlene Weingand states in her book, Marketing/Planning Library and Information Services, "In the nonprofit domain, the budget is the "known" quantity and all possible products must compete for a share of those finite dollars." All primary products of this library are offered to the public at no charge. Some auxiliary products (such as copying) carry a small cost for the consumer. All costs are absorbed by the operating budget.
- The future must explore and expand the operating endowment.

Place:

Primary access to the library products is through the physical location. This library is located in the central business district of this small town in a historical building with a rich history. The building itself is becoming one of the products. Other access is done remotely through the web site, social networking, and the telephone.

Promotion:

This is one element of marketing that is too often seen as the definition of marketing. "This misconception has led to an over emphasis on promotion to the exclusion of the other partners in the marketing process." (Weingand) In the Charlevoix Public Library, many promotional activities take place: news releases, quarterly print newsletter, weekly eList, paid advertisements, flyers, posters on site, web site articles, and web site calendars. Complete promotion and public relations efforts need to be designed and implemented. Care needs to be taken to not be seen as excessive.

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Marketing Statement

This library is in a position with a good foundation and would like to expand the breadth of coverage in the community. The ultimate long-term goal for this marketing campaign is to define this library as “The Information Place” in this community.

Marketing Strategy

1. Determine the programs that meet community needs (surveys, evaluation forms, word of mouth, requests, strategic plan...) Choose one or two special events to focus on every quarter. You can't do a strong marketing push for everything. Pick the most important programs and put full energy there
2. For each program, define the audience. Be as specific as possible. For example, if the audience is young mothers, try to visualize a specific individual in the community you will be marketing to. This will help us answer the following questions:
 - a. Define the reasons this audience would want to come to this program.
 - b. Define the best time of week; time of day would work for the audience.
 - c. Define any obstacles that might stop them from coming (for example, day care needs)
3. What is the best way to get the information to that audience? Take the message to them. For example, announce it at community group meetings, take flyers to the stores, do the sign up at a senior luncheon, etc.
4. Use logos consistently (CPL logo, @ your library, etc.)
5. Weekly column of “Library Happenings” in the newspaper. Cover what's new at the library this week, upcoming programs, new materials, etc. Ask editor for a specific amount of space, write it and send it in each week. This provides a consistent place for patrons to see what's going on. Change weekly ad to look more like a column? Opportunity with new editor at Courier.
6. Word of mouth: find the people who are influential in different subject areas, ask them to spread the word. For example, we might use the art committee to help spread the word for an art exhibit.
7. Make sure all staff at service areas knows what is going on and where. Ask them to promote special events. Provide daily/weekly/monthly calendars of events at each service desk.

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ACTION PLAN

Goal 1: Enhance the Positive and Trusting Relationship with Youth of Charlevoix

Objectives:

1. Increase number of tweens attending library programs by 20%
2. Decrease the number of Code of Conducts distributed by 50% over FY 2010
3. Create Benchmark for number of Code of Conducts distributed
4. Create Benchmark for % of 5th/6th graders that are aware of homework helper resources at the library

Strategy or Action:	Timeline:	Control:
New books talk in ___ grade in three different schools – twice per year	Fall 2010 Spring 2011	Laura
Read library announcements at school twice per year	Complete by 6/30/11	Audrey
Do database demos at the middle school & NWA once per year	Complete by 6/30/11	Audrey, Laura
Create three after hours programs for Tweens	Complete by 6/30/11	Audrey, Laura
Hand out Code of Conducts in Fall and after Spring Break	Fall 2010 April 2011	Val
Visit Teen lounge once/month	ongoing	Val
Each youth dept staff establish personal relationship with at least two tweens	By 6/30/11	Audrey
Organize a library Tween Advisory Group	By 6/30/11	Audrey/Laura

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Goal 2: Foster Positive & Lasting Relationship with Charlevoix Businesses

Objective:

1. Collaborate with NLEA or Chamber on at least two workshops
2. Participate on at least two Chamber committees
3. Collaborate with at least one business for a new program

Strategy or Action:	Timeline:	Control:
Publish monthly "Did you know?" articles on the eNews	Ongoing	Val
Utilize local book store for some of our book purchases	7/1/10	Beth
Welcome local businesses when in the library	Ongoing	Rebecca/Val
Acknowledge local (49720) library vendors in the annual report	9/15/10	Val
Create non-resident employees library card	8/1/10	Julie
Revise Smart Card program	9/15/10	Audrey / Val
Consider local businesses first when purchasing supplies	Ongoing	Julie

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ACTION PLAN

Goal 3: Increase the Usage of Adult Collection

Objective:

1. Increase circulation of adult materials by 5%
2. Customer Service Benchmarks (not sure what this should be?)

Strategy:	Timeline:	Control:
Weed non-fiction and replace with newer titles	Complete by 12/1/11	Beth
Generate monthly articles about current titles for the eNews	Begin 8/1/10	Beth to Val
Update the iBistro catalog so it is more user friendly	Dec. 2010	Val/ Roger
Add new materials information on the front page of the website	Oct 2010	Linda / Roger
Book talks for at least three service clubs	Complete by 6/30/11	Judith
Book talks for both garden clubs	Complete by 6/30/11	Beth
Regularly change the books on display in the stacks	Monthly?	Adult Services Dept PT Staff
Generate at least 6 additional thematic displays	Semi-monthly	Beth

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Budget:

Most service goals can be accomplished with the current staffing levels, as long as the staff stays focused on the strategies, except for one area. Changing technology is an issue that will never cease to be an area of concern. The library needs to stay current in regards to technology so they stay relevant. In order to truly stay on top of all the technology issues, a full-time technology librarian should be considered. Publicity should also continue to be part of the regular marketing strategies and incorporated into the current operating budget.

Evaluation:

Each short-term objective listed in this marketing plan designates a person to manage the objective (control). Each objective is quantifiable. The control person is responsible for adapting the action strategies to best meet the goals (within the context of the macro environment), implementing those actions and then determining if the objective has been met. The control person will be responsible for reporting to their supervisor on the activity of each strategy. The director will then report to the Board of Trustees at the annual meeting.

Summary:

In summary, the Charlevoix Public Library serves a community with a rich heritage in a beautiful resort and rural setting. The library has been meeting and exceeding the expectations of the community in regards to services provided. This marketing plan will be used as a tool to fine tune services offered and continue to grow as the “living room” of the community.